

Annual Report & Accounts 2024-2025



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Welcome from our Chair

The Trustees have pleasure in presenting their Annual Report and the financial statements for the year ended 31 March 2025.

We introduce our Annual Report for 2024/25 by first thanking and celebrating our inspirational workforce, who bring their own life and lived experience every day to their work as they model Recovery and influence people's understanding of mental health. We could not have achieved such impact for people in Dorset this year without the dedication, commitment and continued hard work of our whole workforce.

We would also like to give special thanks to Ann Abraham, recently retired as Forum Chair, for her steadfast leadership over the last four years.

The last year has been one of more challenge, change and transformation across Dorset. It continues to be a difficult time for people and communities, with increased pressure on local mental health and social care services.

During 2024/25, guided by our new Strategy, we are very proud to have responded positively to the ongoing challenges and continual change around us, evolving and structuring our work and activities to meet and support people on their own terms, educating and enabling people, services and systems to celebrate and build on what is strong, in order to meet the challenges of today and those of the future.

There has been a continued focus on collaboration and integration throughout mental health services and across the Dorset System. This includes a commitment to embedding partnership working with the broader voluntary and community sector within local mental health services. We have been delighted to bring our expertise and support to this

significant and ongoing transformation work, facilitating coproduction and ensuring that people's voices and perspectives are always heard and integrated throughout the ongoing review, shaping and design of local services. By supporting people and local organisations to share their voices, we have continued to build capacity within services and communities.

Looking ahead into 2025/26, we are excited to build on the developments and achievements of recent years, guided by the needs of beneficiaries and stakeholders. We believe that our work is even more relevant and vital today and for the years ahead and we remain deeply committed, agile and passionate about driving social and cultural change within services and communities across Dorset.



Tim Harry
Chair of the Trustee Board



Becky Aldridge
Chief Executive



Our journey so far

Having a Voice

1991

Forston Clinic opens

1992

Herrison Hospital (former asylum) closes and site sold for luxury flats

1992

West Dorset Mental Health Forum established

2001

Administrator recruited

2001

Service user involvement established

Involvement to Partnership

2003

Advocacy Service and Forum moved to independent premises

2006

Expand to Dorset Mental Health Forum

2007

Awarded Big Lottery Funding

2008

Sports and Social Programme launched

2009

Dorset Wellbeing and Recovery Partnership (WaRP) established

2011

WaRP ImROC Demonstration site status

2012

Forum Employment Service launched

2012

Recovery Education Centre launched

2012

Hidden Talents launched

Education

2015 and 2017

CQC validate WaRP work

2016

Acute Care Pathway Review

2018

Retreat East opens

2019

Retreat West opens

2019

Mental Health Integrated Community Care (MHICC) Review commences

2019

Discovery Project launched

2019

Dorset Work Matters launched

2020

Dorset Open Door launched

2024

Complex Trauma Pathway and Flourish project launched



Our Impact

58,750

hours of Lived Experience expertise, to increase understanding, model Recovery and support people to build lives they wish to live.

15,781

Recovery focused interactions with people supporting them to have a voice, agency and control.

12,047

opportunities for people to have agency in building their lives.

Lived Experience leadership and representation to

77

decision making boards, steering groups and system meetings, participating in

980

meetings during the year.

429

Recovery Education courses delivered in partnership throughout the year.

We collaborated with

246

community organisations during the year, influencing local services with people's voices and experiences.

224,712

social media impressions and

34,530

visitors to our websites.

Strategic Report

About Us

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and coproduction.

We believe that experiencing mental ill health and managing one's symptoms, should not preclude or diminish a person's right to enjoy all of the opportunities that life can provide, as with managing any physical health condition. This is one of the aspirations that sits behind all our work, along with a passionate desire to challenge the stigma, prejudice and discrimination that still exists around people's experiences of mental health problems.

We have contact with many people who do not want to be defined by their illness or diagnosis, despite managing serious long-term conditions. Many people can lead meaningful and satisfying lives, others require more support to do so, often having been supported by services for most of their lives.

Recovery is at the heart of all that we do, enabling and promoting the value and efficacy of people doing for themselves what they have traditionally been reliant on services to provide, encouraging an environment where people work in partnership with providers of care and treatment, in order to build the lives they wish to live.

“Recovery is not about ‘getting rid’ of problems. It is about seeing people beyond their problems - their abilities, possibilities, interests and dreams - and recovering the social roles and relationships that give life value and meaning.

Repper and Perkins, 2003

Our Vision

A world that understands mental health: where people and communities can enjoy good mental health, citizenship, shared humanity and appropriate support when they experience emotional distress and trauma.

Our Mission

To increase understanding of mental health through lived experience expertise, support Recovery and develop capacity within services and communities to bring about change.



Our Values

Guide everything that we do:

- **Honesty** is our foundation stone.
- Our work requires **Courage**, to be vulnerable and to grow.
- We know the power of **Compassion**.
- **Respect** for who we are is a human right.
- Having **Integrity** means living our values and staying true to our purpose.

Our Beliefs

We believe:

- That people with lived experience of mental health problems have a wealth of specialist knowledge, valuable expertise and experiences.
- In the effectiveness of partnership working in the design and provision of services.
- That everyone has an equal right to enjoy all the opportunities that life provides.
- That there is 'no health without mental health' and that 'mental health is everyone's business'.
- That individuals and communities hold many of their own solutions.
- That hope, mental health and wellbeing are essential to us all.



Activities and Objectives

What we do

We are a community of people who have experiences of mental distress and managing a mental health condition, experiences of trauma, living with long term health issues or caring for someone who is in emotional distress. Our lived experience infrastructure brings the collective voice of lived experience expertise to the heart of real and sustainable change across Dorset.

Utilising our lived experience expertise, we influence and facilitate significant culture change around mental health in Dorset, as well as undertake a range of specialist independent and partnership activities to fulfil our mission and objectives, supporting individuals, communities and local systems to understand mental health. Intrinsic to this work is modelling Recovery and developing capacity and capability within individuals and communities, through Recovery Education and Coproduction.

Social Connection

Our Social Connection Programme works with individuals and organisations to offer different activities across Dorset, developing connections and helping people to build a life within their local community.

Advocacy

We support people to have a voice and exercise their rights in matters that directly affect their lives, including times when they may be subject to the Mental Health Act.



Dorset Wellbeing and Recovery Partnership (WaRP)

The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised, formal partnership between the Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust, putting lived experience expertise hand in hand with professional and technical expertise. The Partnership promotes coproduction and drives culture change across the Integrated Care System in Dorset.

Together the Dorset Wellbeing and Recovery Partnership provides the following projects:

Dorset Recovery Education Centre

Dorset Recovery Education Centre (REC) provides Recovery focused, educational opportunities that enable people to identify their strengths, find hope and build skills, to reframe their experiences of trauma and emotional distress.

Discovery Project

Discovery Project works closely with schools and youth projects to facilitate participation and create mechanisms for young people to have a voice within local services and their communities.

Dorset Open Door

Dorset Open Door is a collaborative, multi-agency bereavement support and signposting service for people in Dorset who have been bereaved by trauma or suicide.

Retreats

Retreats provide a collaborative approach to crisis support in Dorset, through open access safe spaces for people to make sense of their distress in times of self-defined crisis.

Peer Specialists

Peer Specialists within services are staff who intentionally utilise their lived experience of mental health issues, trauma, and emotional distress, to support Recovery oriented practices within local services and broader communities across Dorset.

Carers Project

Carers Project supports the development of lived experience voices of carers, particularly people who have been bereaved by suicide or cared for people who have experienced complex trauma.

Dorset Work Matters

Dorset Work Matters provides an Individual Placement and Support (IPS) employment service to people accessing secondary Mental Health services, as part of a broader ambition to create meaningful vocational opportunities for people in Dorset.



Strategic Goals for 2024-2029

Development of our new Strategy for the period 2024-2029, has been an important workstream during the year, giving the organisation a clear focus and road map

for the years ahead, as we work to influence change and deliver impact across three strategic areas:



Education

People's understanding of mental health and the impact of trauma will be increased through Recovery Education and Coproduction.



Agency

People will have agency and be supported and enabled to live the lives they wish to live, beyond services, within their communities.



Influence

Local services and communities will be influenced, shaped and transformed with the collective voice of Lived Experience.



Making ...
a
Difference
→

Our 2024-2029 Strategy is underpinned by four quality priorities:

We continue to grow and develop our lived experience infrastructure, creating opportunities and mechanisms for people to make sense of and reframe their

experiences, utilising their learning to model Recovery, increase understanding, give hope and support to others and to influence culture change in Dorset.

Proficient workforce

Developing a diverse, influential, inspiring and thriving workforce.

Sustainability and Efficacy

Innovating, diversifying funding, developing partnerships.

Engagement in Communities

Gathering voices, extending reach, and growing contagion.

Impact and Evaluation

Demonstrating impact, building evidence of change being made.



Achievements and Performance during 2024-2025

Lived Experience Infrastructure

Our diverse lived experience infrastructure brings an alternative perspective around mental health to local services and communities, challenging stigma through lived experience expertise and coproduction.

Our courageous and inspiring workforce promote and model the principles of Wellbeing and Recovery in various roles and settings throughout the organisation, local services and across Dorset. Our staff are employed in many different roles, utilising their lived experience and technical expertise. Employment is an intrinsic part of our people's own Recovery journeys, as they discover and develop skills and resilience to build the lives they wish to live, focusing on their strengths, rather than deficits, "what's strong, rather than what's wrong".

Maintaining a psychologically safe, values-based workplace and culture throughout our organisation is paramount for our work. Many of our workforce have experienced periods of crisis and trauma in their lives.

Our people demonstrate courage, tenacity, and compassion within their work and in support of their colleagues every day. Developing capacity, resilience, and sustainability across the organisation to support the workforce and to fulfil our purpose and objectives as a charity continues to be our priority.

During the year, we have further developed pathways for people exploring peer work and opportunities to contribute to the Forum's work, providing a more diverse selection of job roles, that offer supported and substantive employment. We continue to encourage career progression for staff, developing managers and focusing on Lived Experience Leadership. Some people have grown and been promoted within the Forum; others have gained a good understanding of their transferable skills and moved on to develop diverse careers in different sectors across Dorset.

There continues to be significant transformation across the Dorset System, including ongoing review of health and

social care workforce requirements. During recent years, the Forum has been able to contribute to System wide workforce planning, including demonstrating the value and importance of a Lived Experience infrastructure, promoting different ways of working and bringing about culture change across Dorset. There is growing appetite across Dorset to create opportunities and space for people to bring their lived experienced perspectives to a range of new and emerging roles.

Gaining understanding and learning from the experiences of our staff and our beneficiaries is core to everything that we do. Through ongoing feedback and engagement with our staff, we gain further understanding of how best to support people's emotional health in the workplace. This enables us to articulate to other employers and organisations, the fundamentals required to support the mental health and wellbeing of all staff in the workplace.

Our workforce delivered **58,750** hours
of Lived Experience expertise across Dorset during the year.

Growing our collective voice is fundamental to the Forum's work. This year we have increased our focus on community engagement, developing responsive, local opportunities for people to contribute their voices and perspectives, to local change. We understand the importance of reciprocity and contribution within people's personal Recovery journeys and that sharing your story is an individual process that takes courage and at times, specific support.

It has been important to reach out and create opportunities for people who may not feel able or confident to contribute their experiences, to be heard, as new local mental health services are being mobilised. The way that people can access services and support locally is transforming and evolving.

Through different engagement activities, beneficiaries are sharing the things that matter most to them, within their lives and communities. This underpins and shapes the Forum's activities within the Dorset System.



“ I learned what my values are and this helped me to identify what to take with me to grow personally and professionally from here.

Staff Leaver

Strategic Goal: Education

People's understanding of mental health and the impact of trauma will be increased through Recovery Education and Coproduction.

Our experiences are the core of what makes us human. Sharing our stories enables us to connect with each other, regardless of our role, identity or background. Recovery Education helps us to make sense of our experiences and to learn together, as we move forward to create a life that has meaning and purpose for us.

In 2024/25 we celebrated 15 years of the Dorset Wellbeing and Recovery Partnership, a formal partnership between the Forum and Dorset HealthCare University NHS Foundation Trust, putting Lived Experience expertise hand in hand with clinical, professional or technical expertise to facilitate change. Much of the Forum's work is delivered in partnership, modelling how power can be shared and all people can be valued equally as citizens and contributors, bringing about cultural change within Dorset.

This first year of the Forum's new five-year Strategy has provided an opportunity to revisit the basic principles of Recovery and to layer our learning, giving us renewed energy and focus in influencing and advocacy for social justice.

We know from our own and other people's experiences that the impact of trauma is far reaching. The things that happen to us in our lives matter and they influence

and shape who we become as people, how much agency and control we feel we have in our lives and in our relationships, networks and employment. We are delighted that there has been a significant expansion in the Recovery Education Centre (REC) this year, with a specific focus on accessibility and inclusion for people who have experienced complex trauma in their lives. This is important given the detrimental impact of particular diagnostic labels and unfortunately, the stigma that exists within mental health services, which can at times result in more harm for individuals who have already experienced untold trauma and distress.

New courses including Exploring Emotions, Building Safer Connections and Community and Belonging have provided space for people to build understanding, acceptance and self-awareness while benefiting from peer-to-peer learning and support.

Alongside Recovery Education in the REC, we have continued to build and evolve our staff training offer across the Dorset System, supporting the development of new services such as Access Mental Health, embedding trauma informed approaches, alongside delivery of Mental Health Awareness training.

Courses including Our Mental Health and Safety Now bring Lived Experience perspectives and expertise alongside clinical and technical expertise, challenging perceptions and building understanding, which is influencing staff practice and cultural change.

In 2024/25, we have been utilising our Lived Experience of difference to build understanding around neurodiversity and neurodivergence and to challenge stigma. When people experience the world differently, whatever their diagnosis or specific challenges, there can be additional barriers and increased stigma, impacting the person being heard and impeding their access to appropriate support. We believe that defining people by a diagnostic label can be largely unhelpful and that we all have the right to aspire and the ability to thrive, with the right support.

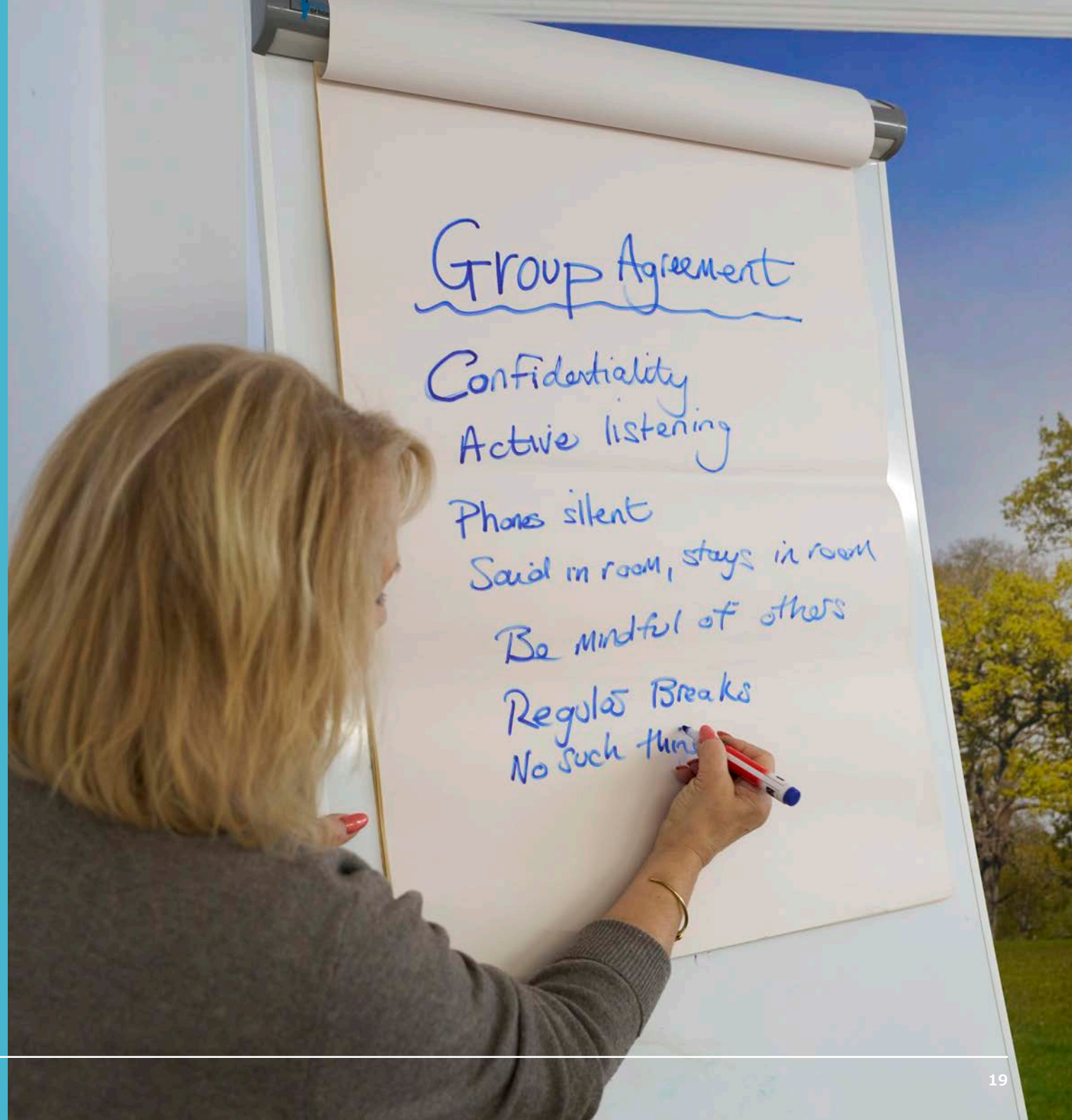
During the year, we have worked in partnership to reduce environmental impacts for people with sensory needs and addressed communication barriers for people. This work has informed the development of Recovery Education and peer support, specifically focused on people with diagnoses of Autism and ADHD and with challenges with food and self-harming.

We have also partnered with Dorset Council to codevelop the local implementation of Oliver McGowan Training (OMT) which aims "to save lives by ensuring that health and social care workforce have the right skills and knowledge to provide safe, compassionate and informed care to autistic people and people with a learning disability".

“

At my lowest I did not realise how my mental health was affecting my life. As a result of this programme, I have come out of the other side of my mental depression. Previously, I was waking up and wishing I had not woken up (I was not suicidal, I just did not want to live) - I did not think I would get back to being me, but I have.

Participant in Flourish Trauma Programme



Impact

This year, through Recovery Education, Lived Experience expertise and sharing people's stories and perspectives, we have increased understanding around mental health and Recovery.

1,478 new students to the Recovery Education Centre.

2,624 Recovery focused conversations within inpatient and community settings.

1,567 staff across the Dorset System received training and Recovery Education.

862 contacts with people impacted by suicide and complex bereavement.

Strategic Goal:

Education

People's understanding of mental health and the impact of trauma will be increased through Recovery Education and Coproduction.

Public Health

In 2023, just over 6,000 people died by suicide in England and Wales. For every death by suicide, it is estimated that 135 people will know and be impacted by each loss of life. Healthcare staff and charity workers make up a significant proportion of those impacted by suicide and sudden death. This is a public health issue and an area that we have been focusing on during 2024/25.

This year, we have codesigned and codelivered Suicide Prevention Level 2 training and begun development of Level 3 training. Alongside this, we have worked with people who have survived or been bereaved by suicide to develop resources focused on safety. We have developed a network of organisations working closely together to provide timely and appropriate support for people in Dorset who are impacted by sudden death and provided peer support to people who have been bereaved by suicide.

Our Young Peers and Discovery Project Team have worked with schools and with young people directly to make sense of loss and to explore what safety means for them and their families.

Equality and Difference

2024/25 has been a year of conflict and unrest across the world. Political volatility and a rise in pejorative rhetoric, alongside continued austerity has left some communities fractured. The impact on mental health and wellbeing is significant and there is a growing sense of unease amongst marginalised groups, creating further isolation. We have intentionally focused on creating opportunities for integration, using Lived Experience and stories to build understanding and promote social connection.

Attendance from the migrant community at our Sports and Social groups increased this year, as the universal language of football brought communities together, enabling us to break-down barriers and create more understanding of what connects us all as humans. We have also expanded partnerships with organisations such as International Care Network (ICN) to remove barriers for individuals to access Recovery Education and benefit from peer support.

Our Peer Specialists continue to work within mental health services and teams across Dorset, bringing Lived Experience perspectives, having Recovery focused conversations and providing peer support to people at times when they are particularly unwell and in hospital. During 2024/25 we have provided Lived Experience expertise at different levels to Dorset's implementation of the nationally driven Culture of Care Programme. This Programme firmly values Lived Experience perspectives and aims to ensure that all inpatient care is Trauma Informed, Autism Informed and Culturally competent.



I thoroughly recommend the training to everyone. The training is just what the title suggests, 'Our Mental Health' the content can be used to help yourself, your friends, family, colleagues and the people we support and work with. I'm actively encouraging people to attend so that they can hopefully benefit in the same way that I have. Thank you!

NHS Staff Member

Strategic Goal:

Agency

People will have agency and be supported and enabled to live the lives they wish to live, beyond services, within their communities.

When we speak to people about what it means to have agency, they talk to us about the importance of connection, having control in their lives and the right and knowledge to develop aspiration and hope for the future. They describe having a life worth living and wanting the opportunity to enjoy relationships, appropriate housing, safe and welcoming spaces, employment, learning, spirituality, meaning and purpose. Our work during 2024/25 has been guided by this, walking alongside individuals to explore what matters most to them, enabling people to explore and identify a life worth living on their own terms.

Over the past few years, we have been working in partnership with mental health services and local community organisations, to codesign support that is more integrated and accessible for people within their local communities, ensuring timely and local help when people are struggling with their mental health and wellbeing.

These changes alone do not address the barriers and isolation that people continue to experience at times within their local communities. For people to recover a life that they deem to be worth living, they need to find a place to belong, to develop networks and to find meaning and purpose on their own terms.

These aspects are not the province of mental health services and are more about what happens for people within communities themselves. The Forum continues to utilise its collective voice and Recovery Education to promote Recovery and build capacity within these communities across Dorset.

During 2024/25 we have had over 10,000 attendances across our Sports and Social Connection programme. We facilitate Sports and Social activities on a neighbourhood level and our team are embedded within local communities. We use relational approaches and our Lived Experience expertise to build trust and confidence. During the year we have offered groups that have helped people to connect with nature through gardening, develop teamwork and social skills through football and sports activities, and build fitness through gym groups and walking, as well as holding regular social groups.

Connection

Access to Lived Experience at the point of transition from service to service, service to home, or through life stages, helps people to find hope for the future. Peers act as a bridge, inspiring hope and facilitating connection with groups and networks in people's local neighbourhoods and communities. People tell us that meeting someone who has been on a similar journey and who speaks your language, enables them to see that Recovery is possible for themselves and to move forward.

In 2024/25, our peer team worked alongside clinicians and support staff in a number of NHS services including Hospitals to Home, Psychiatric Liaison, Rehabilitation and the Criminal Justice Liaison and Diversion services. We continue to support people throughout their Recovery journeys and our experiences enable us to sit alongside people when they are at their most vulnerable and in crisis. Peers working in Retreats as part of the Access Mental Health pathway, skillfully facilitate conversations that enable people to connect with their own strengths and values, to begin to move forward.

Collaboration

Over the last 15 years, we have evolved our understanding of Coproduction, partnership working and the importance of sharing power. This learning has enabled us to work with other organisations across Dorset and beyond, facilitating conversations and undertaking learning activities that build understanding and ignite change. Much of this work involves supporting people and beneficiaries who access projects and services to have a voice. Organisations we have worked with this year include Dorset ICS, Dorset Council, BCP Council, Help and Care, Bournemouth University, Dorset Police, Homewards, Hampshire and Isle of Wight Healthcare, Poole College and International Care Network.



The groups have given me a purpose to get up and get ready for the day. It's been helpful having people to socialise with and to talk / support one another if we need. It's opened up my world that felt so closed off when I was going through some really rough times, and I look forward to attending the groups.

Attendee at Forum Social Group



Impact

This year, through Sports and Social Connection activities, Employment support and access to Lived Experience expertise in different settings, we have supported and enabled people to be active citizens and to have agency to build their lives beyond their mental health experiences.

1,038 groups and activities within local communities across Dorset.

246 collaborations with community groups and organisations.

812 interactions with young people and families.

735 people accessing Employment support.

Strategic Goal:

Agency

People will have agency and be supported and enabled to live the lives they wish to live, beyond services, within their communities.

Citizenship

The right and ability to participate as equal citizens within our communities is essential if we wish to develop agency and have more control in our lives. To do this, we need access to education, vocation and employment opportunities and to resources. During 2024/25 we have expanded our reach through the Partnership employment service, Dorset Work Matters (DWM). DWM is an IPS (Individual Placement and Support) service that works with people who are under the care of secondary mental health services. The service was recognised and celebrated this year as the top performing IPS service in the Southwest and has been awarded an IPS Grow Quality Mark.

The Forum continues to focus on ensuring that aspiration and access to work is explored throughout a person's Recovery journey and also that support is offered to people who have work but are struggling to maintain their jobs due to deteriorating mental health and wellbeing. This work includes linking people into Recovery Education and primary care support such as GPs and Steps to Wellbeing, as well as providing advice and training for employers on how to provide appropriate conditions to support staff wellbeing and to enable people to thrive at work.

There are increasing challenges for young people to cope with in today's world. The world of social media, societal unrest and increasing pressure to succeed in education are all impacting young people in different ways. As a result, there is increased demand for mental health services for young people, rising acuity and growing discomfort in schools. This year we have focused on creating space for young people to make sense of the world around them on their own terms.

By working on a 1-1 basis with young people in crisis and providing courses such as Tackling Loneliness & Making Connections for Young Adults (18-25) and Managing Anxiety as a Young Adult (18-25), we are able to bring the perspective of our Young Peer workforce alongside clinical teams to amplify the voices of young people, supporting and enabling them to articulate and contextualise their experiences for themselves.

“

N was referred for peer support on discharge from hospital and described feeling socially isolated and alone. She was concerned for her Recovery, if she was continually exposed to activities involving alcohol and drugs. N bravely shared her experiences and why she had self-medicated with substances. Through peer support N was able to talk about friendships, a love for baking, arts and crafts and how much she loved her family. N has now accessed the REC and developed her own action plan focused on her wellbeing. N was truly inspiring and demonstrates that with the right support and belief, you can start your Recovery journey.

Hospital to Home Team

Strategic Goal:

Influence

Local services and communities will be influenced, shaped and transformed with the collective voice of Lived Experience.

The Forum continues to be a valued strategic partner within the Dorset Health and Social Care system, working in partnership with organisations across Dorset to represent and amplify the voices and perspectives of people and communities. The Forum has been built over the past 30 years with the voices and experiences of people across Dorset. As we mature as a System partner it is important to ensure that we are representing and amplifying the voices of people and communities to actively influence local priorities and agendas.

On a national level 2024/25 has seen unprecedented changes and challenges within the NHS. This inevitably impacts people and communities; for example responses to people experiencing mental health crisis or access to treatment for people who have struggles with drugs and alcohol, or more than one diagnosis. With the current pressures, there is a danger that people with experiences of trauma and mental ill health can be blamed for pressure on NHS acute services, increasing the likelihood of discrimination and lack of support when it is needed, which then exacerbates challenges for everyone.

Through partnership, we can be courageous and embrace change, particularly different ways of working, putting people and communities at the heart of service design and delivery, sharing power, building understanding and co-creating solutions. We fundamentally believe that people and communities have the capacity to support each other and to reduce reliance on statutory services. To release this capacity, we must build understanding and the most effective way to do this is through hearing people's stories, sharing experiences and advocating for those who often do not have a voice.

This year, we have undertaken a number of community focused listening activities, in response to nationally and locally proposed changes, getting alongside people to gather their views, perspectives and ideas. These activities have enabled us to bring people's voices to the heart of service changes in Dorset, challenging stigma and perceptions, as well as exploring radical solutions for complex problems. We collected 167 individual stories from people within communities across Dorset, who would not otherwise have been able to share their views, without advocacy and support.

Activism

During the year, we have supported activities within healthcare that highlight the harm that can occur when there is inadequate care and support. Initiatives that aim to reduce the use of restrictive practice, such as restraint and seclusion, in mental health acute settings, and to improve the culture of care, have been a key focus for teams during 2024/25. Through people's experiences we have been able to highlight the long-term effects of systemic trauma and racism and to hold space to enable coproduction around specific challenges that are difficult to discuss or to find solutions.

As well as acting as a critical friend to organisations that provide care and support for people, it has been important to enable people to access trusted information and advocacy. We have used our digital presence, through our website and social media, to raise awareness and encourage people to have their say in issues that matter to them.

“

Having the Forum in this space to ensure we really think about people who live with mental health challenges everyday has been important. The purpose of these changes is to try and ensure that people get the right care by the right person. Many of our staff want to do their best to help people but we don't think we have the necessary skills. It really is just about listening at the end of the day.

Staff Member RCRP Group



Impact

This year, through utilising Lived Experience expertise and our collective voices, we have undertaken influencing activities across the Dorset System, to bring about change.

58,750 hours of Lived Experience expertise.

980 participations in system meetings.

9,376 interactions with followers across social media.

156 teams and Organisations receiving Training and support.

Strategic Goal:

Influence

Local services and communities will be influenced, shaped and transformed with the collective voice of Lived Experience.

Parity

Challenging health inequalities has been a key focus in recent years as we have worked to ensure that people who experience mental health difficulties have equitable access to physical health care too. During 2024/25 we developed a series of films that aim to challenge perceptions on what it means to live with complex mental health challenges, or to be diagnosed with a serious mental illness (SMI). By exploring the barriers that people face when accessing support for their physical health, the films also aim to encourage and support people to value and attend to their physical health. We all have mental health and we all have physical health and there are times when we may need a bit of help and support for either.

People of colour and individuals from diverse cultural backgrounds experience inequity of access to health and social care. We acknowledge the need for us to broaden our engagement activities, to build specific understanding of the barriers that people face. During 2024/25 we have worked alongside Dorset HealthCare to support the implementation of PCREF (Patient and Carer Race Equality Framework), NHS England's first anti-racism framework.

We have also proactively expanded our networks to foster allyship, sharing and utilising our position for less listened to perspectives and voices.

System

This year, our focus on Lived Experience Leadership has included building understanding and skills for people to develop their ability to influence. This work has enabled us to ensure that we have more people across our workforce who are able to intentionally share their Lived Experience expertise at a leadership level, alongside team leaders, operational managers, commissioners and community leaders, to bring about change.

Through the service transformation experiences of the past few years, Dorset has developed a good understanding of Coproduction and there is a commitment to work together to bring about culture change. However, we know that this can become more challenging in the midst of operational pressures and difficulties. Embedding individuals with leadership skills, in addition to their Lived Experience expertise, within services and across the system, we can provide challenge but also increased capacity for the cocreation of solutions.

This important work also creates additional progression opportunities, raising the bar for people who historically may not have considered management or leadership roles.

We believe that as the landscape of healthcare changes, it is more important than ever to see people in the context of their whole lives and their communities. During 2024/25 we have continued to use our lived and living experiences to influence closer working across healthcare and within communities, breaking down barriers that have existed since the NHS began, to shape a sustainable future together.

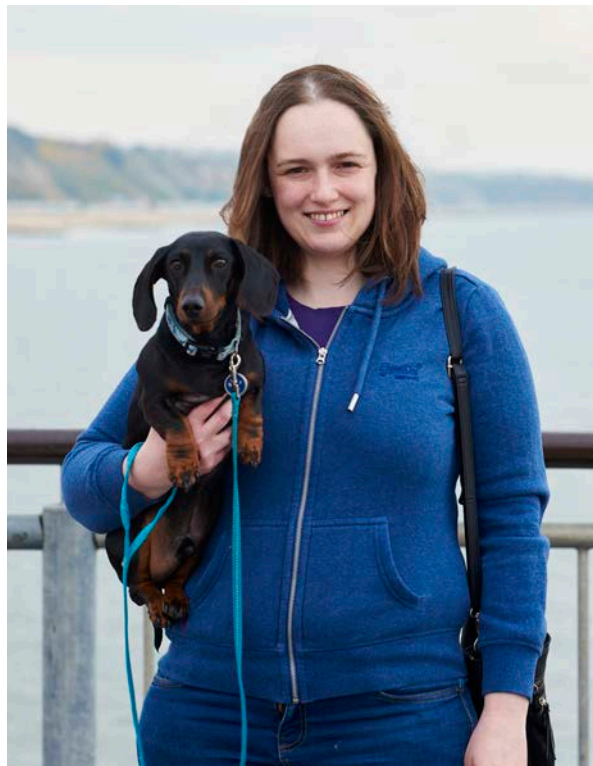


This has been quite a healing conversation; it was a really difficult time, and things didn't go well for me. To know that things can be different for other people and if ever I have to go back it will be a less shaming experience, that's important.

Participant in Listening Project

Future Plans

Development of our Strategy for 2024-2029, has been an important workstream during the year, giving the organisation a clear focus and road map for the years ahead, as we work to influence change and deliver impact across our three Strategic Goals.



Diversity and Engagement

Further developing our lived experience infrastructure and constituency networks to ensure that we are engaging and representative of different communities across Dorset. We are working intentionally to create pathways and opportunities for a diverse workforce that can represent all aspects of experience in Dorset and in our society, increasing understanding and influencing change throughout our work.

Partnerships

Developing relationships across the Dorset System and local communities to collaborate, add value, build capacity, grow connections and influence change. We will continue to enable local communities to have an increased understanding of mental health, through Recovery Education and Coproduction.





Income diversification

Developing different income generation and fundraising activities for longer term sustainability, independence and integrity to fulfil the Forum's Vision, Mission and charitable purpose.

Demonstrating impact

Continuing to develop the Forum's systems and processes as part of our ongoing data and evaluation journey, to capture and communicate the impact of our work for staff, funders and the people of Dorset.



Digital transformation

Building on considerable progress made in recent years to further embrace new ways of working and explore opportunities for developing innovation, efficiencies, quality assurance, governance, communication and engagement throughout all of the Charity's operations. This includes a commitment to celebrating difference, supporting equality of opportunity and continuous learning and development.

Future Plans

Financial Position

The Forum has a range of funding streams, which include contracts and grants to provide specific services, as detailed in the financial statements, as well as funding from grant making bodies to fulfil our aims and objectives. In addition to this, the Forum continues to develop its social enterprise activities. Many of our activities are currently focused within the NHS and wider integrated system, in order to bring lived experience expertise and challenge on behalf of beneficiaries to the shaping and future design of local mental health services. As with many third sector and 'not for profit' organisations, our funding streams are timebound and variable, which means continual review of our funding strategy.

Maintaining independence as an organisation is vital in our work. Our fundraising strategy for the years ahead includes increasing our independent funding sources and further developing our social enterprise activities, in response to the growing awareness of the need to understand and respond to mental health differently across all sectors, communities and systems.

The Forum continues to manage its resources in an efficient manner and is therefore able to ensure that funding is targeted on developing and improving services. We recognise the necessity of

raising funds and generating diverse income streams, in order to strengthen our service delivery and to fulfil our objectives and potential as an organisation. Achieving longer term financial sustainability is a priority for the years ahead, even more so as we see increasing financial pressures on public services, as a result of the pandemic, the cost-of-living crisis and other global factors.

The Forum has received a number of generous donations and support throughout the year from individuals, community groups and organisations, which further enable our work.

The Trustees would like to thank everyone who has contributed to the Forum's activities during the year for their support, including the Charity's workforce, volunteers, beneficiaries, funders and donors.

Income for the year decreased by £33,844 on 2023/24 and expenditure increased by £82,891. Delivery activity was maintained at similar levels during the year, with expenditure against restricted reserve funds during the year, shown in Note 15 of the Financial Statements.

The cash balance held, as per the balance sheet, includes income deferred into 2025/26 for activities that will take place during that year. In addition, reserves

are held for future activities. Ideally, income received and associated activity and expenditure occur in the same financial year. This is not always possible given the nature of charity finance, the operating environment and the Charities Statement of Recommended Practice (SORP). This results in fluctuations in the Year End outturn position, as can be seen in the Statement of Financial Activities on page 44.

Income levels have been consistent overall, but variable during the year, as shown in Notes 2 and 3 of the Financial Statements.

There was increased investment in the Recovery Education Centre in the year, additional workstreams within the Dorset Wellbeing and Recovery Partnership portfolio and new workstreams for Hampshire and Isle of Wight Healthcare NHS Foundation Trust (HIoW Healthcare) and the International Care Network (ICN). There continues to be a range of income streams that have had no inflationary increase for a number of years, making it challenging to meet and sustain increased inflationary costs.

Trustees are assured and satisfied that the organisation is a going concern for the next 12 months and has financial resilience for the foreseeable future, in spite of the complex operating environment.

	2025	2024
	£	£
Income during the year was:	1,455,487	1,489,331
Of which related to restricted project activities:	1,292,669	1,335,460
Total expenditure during the year was:	1,492,923	1,410,032
Of which was from restricted funds:	1,404,778	1,306,926
Of which was from unrestricted funds:	88,145	103,106
Net expenditure (2025) / net income (2024) for the year:	(37,436)	79,299
Net income relating to unrestricted activities:	74,673	50,765
Net expenditure (2025) / net (2024) relating to restricted funds:	(112,109)	28,534

Fundraising Activities

The Forum does not actively undertake any direct fundraising activities and does not engage anyone to undertake such activities on its behalf.



Financial and Management Policies

Reserves Policy

Trustees are aware of the need to retain funding for future endeavours and developments, in order to meet the needs of the Charity's beneficiaries. Trustees review the level of reserves required on a regular basis, to ensure that they are adequate to fulfil the Charity's continuing obligations and in line with the Charity's Reserves Policy and objectives.

The Charity regularly reviews its Reserves Policy to ensure that it is achieving the appropriate balance between the need to serve beneficiaries as quickly as possible and the need to manage risks appropriately. In doing so, the Charity considers sector guidance for charities to hold reserves for the purpose of protecting the continuity of the Charity's work, providing funds needed for the development of the Charity, or providing funds needed to replace assets. It is the policy of the Charity that reserves should provide adequate financial stability and means for the Charity to meet its charitable objectives for the foreseeable future.

The Reserves Policy and the designations made within the reserves are key tools in monitoring and maintaining sufficient cash flows. The Trustees deem it necessary to have the security of reserves to maintain and develop activities with confidence, particularly where there may be timing delays with funding streams and to build resilience in the event of unforeseen difficulties. The determination of an

appropriate reserves level is a key part of the strategic planning process and is linked to risk assessment of key areas of income and expenditure, along with future strategic development.

Trustees review the allocation of the Charity's reserves and make specific designations where applicable. Restricted funds are funds required to be used for a specific purpose. Free reserves represent unrestricted funds of the Charity excluding restricted and designated funds. The Trustees aim to hold sufficient free reserves to ensure financial sustainability, operational continuity to meet the needs of beneficiaries in the event of unforeseen situations and future strategic development.

The trustees have reviewed the Reserves Policy during the year. Trustees consider it prudent to set aside an amount equivalent

to between three and twelve months of anticipated annual running costs. For the coming year, based on 2024/25 figures, this range would be between £107,655 and £430,623.

As at 31 March 2025, free reserves are within the range of the Reserves Policy.

These reserves would enable the Charity to continue to operate in the short term in the event of income shortfall and while action is being taken to replace funding or to implement required changes. Trustees continue to take active steps to increase the level of free reserves to build resilience and the longer-term sustainability and stability of the Charity.

	2025	2024
	£	£
Reserves at 31 March:	1,295,401	1,332,837
Consisting of restricted funds of:	822,346	934,455
And unrestricted funds of:	473,055	398,382
Of which are determined by the Trustees as Designated funds for specific purposes*:	70,000	63,020
Less fixed assets:	Nil	Nil
Free reserves:	403,055	335,362

Investment Powers

The Constitution authorises the Trustees to use all money raised to further its Objects and to do all things that are lawful and conducive to the attainment of those Objects and does not prevent investment.

Investment and Cash Management Policy

Management of cash reserves is governed by the Investment and Cash Management Policy, which establishes the Charity's investment objectives (in order of priority) as:

1. Capital preservation;
2. Liquidity; and
3. Income generation.

The Policy prohibits investment in instruments which do not guarantee principal repayment and controls credit risk, with bank counterparty limits approved by the Finance and Audit Committee.

Liquidity is ensured by specifying a minimum balance to be retained in instant access bank accounts, with a complementary limit on the average term or notice period for other deposits. Within these parameters, the Finance Team has delegated authority to manage the Charity's current and deposit accounts to maximise interest income, as far as consistent with limiting operational risk. This means that sufficient funds are available at any one time to ensure that the Charity can meet all its liabilities.

The Investment and Cash Management Policy is approved by the Board annually and monitored on a quarterly basis by the Finance and Audit Committee.

Risk Management

The Trustees acknowledge their responsibility to give due consideration to the risks to which the Charity is exposed and have put in place processes to identify and manage risks through Risk Registers. Risks are regularly reviewed, assessed, managed and escalated appropriately in accordance with the Risk Management Policy.

The Trustees have given due consideration to the major risks to which the Charity is exposed and are satisfied that systems, processes and procedures are established in order to manage these risks. Risk management processes are in place and continue to be developed as required throughout the organisation. The Forum is committed to the continuous improvement of practices and procedures, including identifying improvements to risk management processes. These include regular review of internal control systems, which enable the Senior Leadership Team and Trustees to identify, manage and satisfactorily control risk exposures.

The Board regularly reviews organisational and strategic priorities, associated risks and mitigating factors. During the year, the Board has considered the risk of loss

of funds through situations such as cyber-crime, fraud, global banking crisis or inflation and this has been a key area of focus for the Finance and Audit Committee.

The top three risks to the charity in the year ahead are:

- Sudden and significant (20-50%) decrease in funding / loss of funds - arising from changes in priorities nationally / locally, due to change and destabilisation; or situations like counterparty default, cyber-crime, fraud, banking crisis or inflation.
- Increase in demand for Forum's activities - arising from growing acuity, ongoing uncertainty and continual change across the Dorset System.
- Unable to demonstrate successful delivery of the Strategy and the Forum's impact - due to insufficient impact data and evaluation activities, as a result of underdeveloped data and reporting mechanisms across the business.

Work to strengthen governance mechanisms has been ongoing during recent years. An established Internal Audit and Quality Improvement Plan is in place, including ongoing review of the Charity's controls and procedures and development of a range of assurance mechanisms. The two Board Committees provide scrutiny, information, assurance and recommendation for the Board, adding valuable capacity to the Charity's governance processes and activities.

Structure, Governance and Management

Governing Document and Constitution

Dorset Mental Health Forum is a registered Charitable Incorporated Organisation (CIO) in England and Wales, Charity number 1169215. The CIO's principal office is 29/29A Durngate Street, Dorchester, Dorset, DT1 1JP. It is governed by its Constitution which was originally adopted on 16 September 2016 when the CIO was first established. The Dorset Mental Health Forum, Charity number 1073818, transferred all assets, liabilities, activities, staff and undertakings to the new Dorset Mental Health Forum CIO on 31 March 2017.

The Forum Charity is governed by its Constitution and the Objects of the CIO are:

To promote and protect mental health for the public benefit, including but not exclusively by:

- a. Supporting the Recovery of people experiencing mental distress, by creating opportunities for people to reconnect with their own strengths and resources, in order to build the lives they wish to live.
- b. Challenging discrimination against people experiencing or affected by mental distress by modelling the value of lived experience expertise, including representation and involvement in the improvement and shaping of mental health services.

- c. Advancing the education and understanding of the general public in all areas relating to mental health by promoting the principles of mental health, Wellbeing and Recovery through Coproduction and Recovery Education.
- d. Developing the skills, capacity and opportunities to build socially inclusive, equitable and reciprocal communities which actively support good mental health.

Public Benefit

The Dorset Mental Health Forum is a values-based Charitable Incorporated Organisation influencing social change and advocating for social justice in Dorset and beyond. We increase understanding of mental health, wellbeing and Recovery, challenging prejudice around people's experiences of mental distress and trauma, through lived experience expertise, education and Coproduction.

The Trustees have paid due regard to the Charity Commission's guidance on public benefit in deciding the activities undertaken by the Charity during the year. The Trustees are satisfied that the information provided in the Trustees' report and accounts meets the public benefit reporting requirements.

Trustees understand the difference made to the lives of the Charity's beneficiaries, as well as to society for public benefit.

The Forum's beneficial purpose and activities are as stated above. The Forum's workforce models, facilitates and provides hope, opportunity and understanding around mental health throughout all of its projects and activities. This has enormous impact for people who experience mental illness and who have direct contact with any of the Forum's workforce and operational activities, as direct beneficiaries. In addition to this direct benefit, the Forum's activities also raise awareness, challenge stigma, influence culture and change behaviour within individuals, organisations, local communities and service systems, for public benefit in Dorset and beyond.

Recruitment and Appointment of Trustees

Appointment of Board members ("Trustees" for Charity legislation purposes) is governed by the Constitution of the Charity.

Trustees are appointed, and reappointed, by the Members of the Charity at the AGM. New Trustees may also be appointed between AGMs by the existing Trustees but must retire and be reappointed by the Members at the subsequent AGM. The Board reviews its composition and performance regularly to ensure the appropriate balance of skills, experience, backgrounds and knowledge.

The following people were Trustees of the Charity during the year:

- Ann Abraham
(retired as Chair in November 2024)
- Alison Chorley
- Sorrelle Ford
- Tim Harry
(new Chair from November 2024)
- Peter Lovibond
- Arthur Merchant
- Sarah Murray
- Davide Rodrigues

None of the Trustees has any beneficial interest in the Charity.

The Forum's Board of Trustees is responsible for the overall governance and strategic direction of the Charity. The Chief Executive is accountable to the Forum's Board of Trustees. During the year, all Trustee and Board activities were able to be carried out either in person or virtually, with minimal disruption to business.

Induction and Training of Trustees

New Trustees undergo an induction period in which they become familiar with the activities of the Charity, its core values, and its governance structure and processes, with support and mentoring as required. Once appointed, new Trustees keep themselves appraised of any new guidance issued by the Charity Commission and other relevant agencies. A Governance Handbook, compiled in 2021-22 is accessible to all Trustees through a shared digital space, as part of ongoing digital transformation work.

During the year, we have continued to review and strengthen the Charity's governance structure. Trustees meet quarterly for Board meetings to discuss the business and governance of the organisation. This includes developing strategy, risk management and reviewing operational and financial information for the Charity. The Finance and Audit Committee and the Appointments and Remuneration Committee meet quarterly during the year, feeding directly into Board meetings as part of a programmed Board cycle for the year. Both Committees undertake an annual review of performance in relation to their Terms of Reference, providing assurance to the Board.

Trustees are included and encouraged to participate in whole team building events and Forum activities, as well as to undertake training and attend Recovery Education Centre courses. The Forum provides full indemnity insurance for its Trustees.

Board Development

Development work is ongoing with the Forum Board building resilience and longer-term sustainability for the organisation. Diversity of experience and perspective and the required skill set of the Board is reviewed regularly. The Charity considers review, appraisal and development of the Board and its effectiveness, to be important processes and utilises sector resources to undertake these activities and inform performance and appropriate governance. These include the current Charity Governance Code (2020) and the related NCVO Governance Wheel Toolkit (2021), which shape regular Board

Surveys to assess effectiveness and areas of development. The Board has quarterly workshops to spend specific time on learning and development for Trustees, Board development and strategic review and planning.

Succession planning has been a key consideration during the year. In November 2024, Ann Abraham retired as Forum Chair and was succeeded by Tim Harry, following an internal recruitment process. Special thanks go to Ann for her dedication and commitment during her time as Forum Chair. With longer term succession planning in mind, Trustee recruitment activities commenced in March 2025.

Policies

The Forum is committed to the continuous improvement of practices, policies and procedures and continues to review and update these as required and on an ongoing basis. Trustees have reviewed and continued to develop the Forum Policy Framework during the year. Key policies refreshed this year included Investment and Cash Management Policy, Health and Safety Policy Statement, Risk Management Policy and the new Anti-Fraud, Bribery and Corruption Policy. Safeguarding is intrinsic to everything that we do. This year we have strengthened our Safeguarding governance structures and updated our Safeguarding Policy and Procedures. Further review and development of policies is taking place during 2025/26.

The Charity is continuing to work with the NCVO Trusted Charity Quality Standards, with a view to seeking external assessment, once development areas are complete.

Statement of Trustees' Responsibilities

The Trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

The law applicable to charities in England & Wales requires the Trustees to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the Charity and of the income and expenditure of the Charity for that period. In preparing these financial statements, the Trustees are required to:

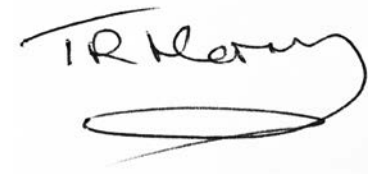
- Select suitable accounting policies and then apply them consistently;
- Observe the methods and principles in the Charities SORP;
- Make judgments and accounting estimates that are reasonable and prudent;
- State whether applicable accounting standards have been followed, subject to any material departures disclosed and explained in the financial statements, and
- Prepare the financial statements on the going concern basis unless it is inappropriate to presume that the Charity will continue in business.

The Trustees are responsible for maintaining proper accounting records which disclose with reasonable accuracy at any time the financial position of the Charity and enable them to ensure that the financial statements comply with the Charities Act 2011, the Charity (Accounts and Reports) Regulations 2008 and the provisions of the constitution. They are also responsible for safeguarding the assets of the Charity and hence for taking reasonable steps for the prevention and detection of fraud and other irregularities.

In so far as the Trustees are aware:

- There is no relevant audit information of which the Charity's auditors are unaware; and
- The Trustees have taken all steps that they ought to have taken to make themselves aware of any relevant audit information and to establish that the auditors are aware of that information.

The Trustees are responsible for the maintenance and integrity of the Charity and financial information included on the Charity's website. Legislation in the United Kingdom governing the preparation and dissemination of financial statements may differ from legislation in other jurisdictions.



Tim Harry
Chair

29 July 2025



Independent Auditor's Report to the Trustees of Dorset Mental Health Forum

Opinion

We have audited the financial statements of Dorset Mental Health Forum (the 'Charitable incorporated organisation') for the year ended 31 March 2025 which comprise the Statement of Financial Activities, the Balance Sheet, the Statement of Cashflows and notes to the financial statements, including a summary of significant accounting policies.

The financial reporting framework that has been applied in their preparation is applicable law and United Kingdom Accounting Standards, including Financial Reporting Standard 102: The Financial Reporting Standard applicable in the UK and Republic of Ireland (United Kingdom Generally Accepted Accounting Practice).

In our opinion, the financial statements:

- give a true and fair view of the state of the Charity's affairs as at 31 March 2025 and of its income and expenditure for the year then ended;
- have been properly prepared in accordance with United Kingdom Generally Accepted Accounting Practice;
- have been prepared in accordance with the requirements of the Charities Act 2011.

A C Mole LLP is eligible to act as an auditor in terms of section 1212 of the Companies Act 2006.

Basis for opinion

We conducted our audit in accordance with International Standards on Auditing (UK) (ISAs (UK)) and applicable law. Our responsibilities under those standards are further described in the Auditor's responsibilities for the audit of the financial statements section of our report. We are independent of the Charity in accordance with the ethical requirements that are relevant to our audit of the financial statements in the UK, including the FRC's Ethical Standard and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Conclusions relating to going concern

In auditing the financial statements, we have concluded that the Trustees' use of the going concern basis of accounting in the preparation of the financial statements is appropriate.

Based on the work we have performed, we have not identified any material uncertainties relating to events or conditions that, individually or collectively, may cast significant doubt on the society's ability to continue as a going concern for a period of at least twelve months from when the financial statements are authorised for issue.

Our responsibilities and the responsibilities of the Trustees with respect to going concern are described in the relevant sections of this report.

Other information

The Trustees are responsible for the other information. The other information comprises the information included in the annual report other than the financial statements and our auditor's report thereon. Our opinion on the financial statements does not cover the other information and, except to the extent otherwise explicitly stated in our report, we do not express any form of assurance conclusion thereon.

In connection with our audit of the financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the financial statements or our knowledge obtained in the audit or otherwise appears to be materially misstated. If we identify such material inconsistencies or apparent material misstatements, we are required to determine whether there is a material misstatement in the financial statements or a material misstatement of the other information. If, based on the work we have performed, we conclude that there is a material misstatement of this other information, we are required to report that fact.

We have nothing to report in this regard.

Independent Auditor's Report to the Trustees of Dorset Mental Health Forum

Matters on which we are required to report by exception

In light of the knowledge and understanding of the charity and its environment obtained in the course of the audit, we have not identified material misstatements in the trustees' report.

We have nothing to report in respect of the following matters in relation to which the Charities Act 2011 requires us to report to you if, in our opinion:

- the information given in the trustees' report is inconsistent in any material respect with the financial statements; or
- sufficient accounting records have not been kept; or
- the financial statements are not in agreement with the accounting records; or
- we have not received all the information and explanations we require for the purposes of our audit.

Responsibilities of the Trustees

As explained more fully in the Trustees' responsibilities statement, the Trustees are responsible for the preparation of the financial statements and for being satisfied that they give a true and fair view, and for such internal control as the trustees determine is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, the Trustees are responsible for assessing the Charity's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Trustees either intend to liquidate the Charity or to cease operations, or have no realistic alternative but to do so.

Independent Auditor's Report

to the Trustees of Dorset Mental Health Forum

Auditor's responsibilities for the audit of the financial statements

We have been appointed as auditor under section 144/145 of the Charities Act 2011 and report in accordance with the regulations made under section 145 of that Act.

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (UK) will always detect a material misstatement when it exists.

Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

Irregularities, including fraud, are instances of non-compliance with laws and regulations. We design procedures in line with our responsibilities, outlined above, to detect material misstatements in respect of irregularities, including fraud. The extent to which our procedures are capable of detecting irregularities, including fraud is detailed below:

Identifying and assessing potential risks of material misstatement due to irregularities

We considered the following when identifying and assessing risks of material misstatement due to irregularities, including fraud and non-compliance with laws and regulations:

- the legal and regulatory framework in which the Charity operates
- the nature of the sector in which the Charity operates
- the control environment and controls established to mitigate such risks
- the results of our enquiries of management about their identification and assessment of risks of irregularities
- discussions with the audit engagement team about where fraud might occur
- the incentives for fraud.

Laws and regulations which are considered to be significant to the Charity include those relating to the requirements of financial reporting framework FRS102, the Charities Act 2011, UK tax legislation, employment law and health and safety. In addition, we consider other laws and regulation which may not directly impact the financial statements but may impact on the operation of the Charity.

As a result of these procedures we concluded, in accordance with International Auditing Standards, that a risk in relation to the potential for management override of controls existed.

Audit responses to risks identified

We undertook audit procedures to respond to the risks identified, and designed our audit testing to respond to these risks. The additional procedures we undertook included the following:

- gaining an understanding of the Charity's procedures for ensuring compliance with laws and regulations
- testing the appropriateness of journal entries and other adjustments
- considering whether accounting estimates were indicative of potential bias
- considering whether any transactions arose outside the normal course of business
- making enquiries of management
- corroborating our enquiries through review of Board Minutes and correspondence.

Independent Auditor's Report to the Trustees of Dorset Mental Health Forum

We also communicated relevant laws and regulations and potential fraud risks to all engagement team members and remained alert to any indicators of fraud or non-compliance with laws and regulations throughout the audit.

A further description of our responsibilities for the audit of the financial statements is located on the Financial Reporting Council's website at: www.frc.org.uk/auditorsresponsibilities. This description forms part of our auditor's report.

Use of our report

This report is made solely to the Charity's Trustees, as a body, in accordance with section 144 of the Charities Act 2011 and the regulations made under section 154 of that Act. Our audit work has been undertaken so that we might state to the Charity's Trustees those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Charity's Trustees as a body, for our audit work, for this report, or for the opinions we have formed.

ACMOLE LLP

A C Mole LLP (Statutory Auditor)
Chartered Accountants and Statutory Auditors
Stafford House
Blackbrook Park Avenue
Taunton
Somerset
TA1 2PX

29 July 2025

Statement of Financial Activities

For the year ended 31 March 2025

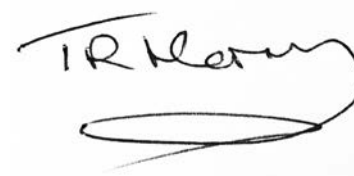
	Notes	Unrestricted Funds	Restricted Funds	Total Funds 2025	Unrestricted Funds	Restricted Funds	Total Funds 2024
		£	£	£	£	£	£
Income:							
Donations and legacies	2	22,480	-	22,480	1,930	-	1,930
Charitable activities	3	103,179	1,292,669	1,395,848	116,295	1,335,460	1,451,755
Investment income		36,742	-	36,742	34,241	-	34,241
Other		417	-	417	1,405	-	1,405
Total income		162,818	1,292,669	1,455,487	153,871	1,335,460	1,489,331
Expenditure:							
Charitable activities	4	88,145	1,404,778	1,492,923	103,106	1,306,926	1,410,032
Total expenditure		88,145	1,404,778	1,492,923	103,106	1,306,926	1,410,032
Net (expenditure)/income		74,673	(112,109)	(37,436)	50,765	28,534	79,299
Net movement in funds		74,673	(112,109)	(37,436)	50,765	28,534	79,299
Reconciliation of funds							
Total funds brought forward		398,382	934,455	1,332,837	347,617	905,921	1,253,538
Total funds carried forward		473,055	822,346	1,295,401	398,382	934,455	1,332,837

Balance Sheet

For the year ended 31 March 2025

		2025		2024	
	Notes	£	£	£	£
Fixed assets					
Tangible assets	9		-		-
Current assets					
Debtors	10		77,645		203,084
Cash at bank and in hand			1,471,418		1,332,451
			1,549,063		1,535,535
Creditors					
Amounts falling due within one year	11	253,662		202,698	
Net current assets			1,295,401		1,332,837
Total assets less current liabilities			1,295,401		1,332,837
Net assets			1,295,401		1,332,837
The funds of the Charity					
Unrestricted funds					
General funds	15		403,055		335,362
Designated funds	15		70,000		63,020
			473,055		398,382
Restricted funds	15		822,346		934,455
Total Charity funds			1,295,401		1,332,837

Approved by the Board of Trustees for issue on
29 July 2025 and signed on their behalf by:



Tim Harry, Chair

Statement of Cashflows

For the year ended 31 March 2025

		2025		2024	
	Notes	£	£	£	£
Cashflows from operating activities					
Net cash provided by/(used in) operating activities	13		102,225		(308,401)
Cashflows from investing activities					
Interest from investment		36,742		34,241	
Net cash provided by investing activities			36,742		34,241
Change in cash and cash equivalents in the reporting period			138,967		(274,160)
Cash and cash equivalents at the beginning of the reporting period			1,332,451		1,606,611
Cash and cash equivalents at the end of the reporting period			1,471,418		1,332,451



Notes to the Financial Statements

For the year ended 31 March 2025

1. Accounting Policies

1.1 General information

Dorset Mental Health Forum is a Charitable Incorporated Organisation governed by its Constitution.

The address of the principal office is given on page 63. The nature of the Charity's operations and its principal activities are set out in the Trustees' report on pages 3-38.

Basis of accounting and assessment of going concern

The financial statements have been prepared under the historical cost convention with items recognised at cost or transaction value unless stated otherwise within these notes.

The financial statements have been prepared in accordance with Accounting and Reporting by Charities: Statement of Recommended Practice applicable to charities preparing their accounts in accordance with the Financial Reporting Standard applicable in the UK and Republic of Ireland (FRS 102) (issued October 2019) - (Charities SORP (FRS 102)), the Financial Reporting Standard applicable in the United Kingdom and Republic of Ireland (FRS 102) and the Charities Act 2011.

The Charity meets the definition of a public benefit entity under FRS 102.

The Trustees consider that there are no material uncertainties about the Charity's ability to continue as a going concern.

1.2 Income recognition

All income is included in the statement of financial activities when the Charity is entitled to the income, it is probable the income will be received and the amount can be measured reliably. The following specific policies are applied to particular categories of income.

Donations and gifts are recognised in the Statement of Financial Activities when receivable. Legacy income is recognised in the financial statements in the period that it has been received or where there is sufficient evidence that it is probable that the legacy will be received.

Income from grants and contracts, relating to charitable activities are recognised in the Statement of Financial Activities when receivable. If there is a Service Level Agreement or Contract in place income is taken into account in the period to which it relates. Where grants and contract income received have conditions or restrictions as to their use attached the income is recognised as restricted income funds. Where no such conditions or restrictions exist, grants and contract income received are recognised as unrestricted income.

Investment income in respect of funds held on deposit is included when receivable and the amount can be measured reliably. This is normally upon notification of the interest paid by the bank.

Other income is recognised in the Statement

of Financial Activities when receivable; this relates largely to the reimbursement of expenditure.

1.3 Donated services

In accordance with the Charities SORP (FRS 102), any unpaid general volunteer time is not recognised in the financial statements.

1.4 Expenditure recognition

Liabilities are recognised as expenditure as soon as there is a legal or constructive obligation committing the Charity to that expenditure, it is probable that settlement will be required and the amount of the obligation can be measured reliably. All expenditure is accounted for on an accruals basis. All expenses, including support costs and governance costs, are allocated or apportioned to the applicable expenditure headings in the statement of financial activities.

Charitable expenditure comprises those costs incurred by the Charity in the delivery of its charitable activities and services. It includes both costs that can be allocated directly to such activities and costs of an indirect nature which are necessary to support them. Those support costs of an indirect nature include the resources of senior management, personnel, HR, IT, premises, finance and governance which are apportioned on a basis consistent with the use of resources largely by reference to time spent although

alternative methods of apportionment may be used where they produce a more equitable result. Details of apportionment of support costs are shown in note 5.

1.5 Pension costs

The Charity operates workplace pension schemes for its qualifying employees. The schemes used are the government established National Employment Savings Trust (NEST) and Standard Life Stakeholder Scheme. Both schemes are defined contribution schemes and the amount included in the Statement of Financial Activities represents the contributions payable to the scheme in respect of the accounting period.

1.6 Operating leases

Leases in which substantially all the risks and rewards of ownership are retained by the lessor are classified as operating leases. Rentals payable under operating leases are charged to the Statement of Financial Activities over the term of the lease. The Charity has operating leases for the premises from which it operates. The title of the leased premises remains with the lessor.

1.7 Fixed assets

Where fixed assets are purchased they are stated at their purchase cost plus any incidental expenses of acquisition. Where fixed assets are donated, they are stated at their estimated market value on acquisition. Depreciation is charged in respect of fixed

assets and is calculated so as to write off the cost of the assets, less any estimated residual value, over their expected useful economic useful lives as follows:

Office equipment and furniture - 25% straight line.

1.8 Cash and cash equivalents

Cash and cash equivalents includes cash in hand and other short term highly liquid investments that are readily convertible to a known amount of cash and are subject to an insignificant risk of change in value.

1.9 Taxation

Dorset Mental Health Forum is a registered charity and is therefore not liable to taxation to the extent that its income and gains are applicable to charitable purposes only. Value added tax is not recoverable and is therefore included in the relevant costs in the Statement of Financial Activities.

1.10 Fund accounting

General funds are unrestricted funds which are available for use at the discretion of the Board in furtherance of general objectives of the Charity, and which have not been designated for other purposes.

Designated funds are unrestricted funds earmarked by the Trustees for particular purposes.

Restricted funds are to be used for specific purposes as laid down by the donor.

Expenditure which meets this criterion is charged to the fund, together with fair allocation of management and support costs as appropriate.

1.11 Financial instruments

The Charity only has financial assets and liabilities that qualify as basic financial instruments including trade and other debtors, cash and bank balances and trade and other payables. Basic financial instruments are initially recognised at transaction price and subsequently at amortised cost.

1.12 Critical accounting estimates and judgements

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. Estimates and judgements are continually evaluated and are based on historical experience and other factors, including expectations of future events that are believed to be reasonable under the circumstances. The resulting accounting estimates will, by definition, seldom equal the related actual results.

The Trustees are of the opinion that there are no estimates or assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year.

2. Income from donations and legacies

	Unrestricted Funds	Restricted Funds	Total Funds 2025	Unrestricted Funds	Restricted Funds	Total Funds 2024
	£	£	£	£	£	£
Donations and gifts	22,480	-	22,480	1,930	-	1,930
	22,480	-	22,480	1,930	-	1,930

3. Income from charitable activities

	Unrestricted Funds	Restricted Funds	Total Funds 2025	Unrestricted Funds	Restricted Funds	Total Funds 2024
	£	£	£	£	£	£
Advocacy						
Dorset Council	-	-	-	-	11,099	11,099
Dorset Healthcare	-	-	-	-	1,261	1,261
BCP Council	-	-	-	-	16,650	16,650
Lived Experience Infrastructure						
Dorset HealthCare	84,259	-	84,259	84,259	-	84,259
NHS Dorset ICB	10,000	-	10,000	10,000	-	10,000
BCP Council	5,000	-	5,000	5,000	-	5,000
Recovery Education Centre (REC)	-	128,022	128,022	-	75,235	75,235
Dorset Wellbeing and Recovery Partnership						
Dorset HealthCare	-	919,652	919,652	-	907,237	907,237
DMH Carers Project Income	-	3,000	3,000	-	3,000	3,000
Employment Service	-	125,000	125,000	-	125,000	125,000
Sports and Social Programme	-	7,685	7,685	-	3,995	3,995
SMI Physical Health	-	3,500	3,500	-	47,800	47,800
Dorset Open Door	-	34,015	34,015	-	71,878	71,878
Suicide Prevention	-	-	-	-	27,000	27,000
Health Education England	-	-	-	-	45,305	45,305
Social Enterprise	3,920	-	3,920	17,036	-	17,036
HIoW Healthcare	-	49,253	49,253	-	-	-
International Care Network	-	7,800	7,800	-	-	-
Dorset Council	-	14,742	14,742	-	-	-
	103,179	1,292,669	1,395,848	116,295	1,335,460	1,451,755

4. Expenditure on charitable activities

	Activities undertaken directly	Support Costs	Total 2025	Activities undertaken directly	Support Costs	Total 2024
	£	£	£	£	£	£
Advocacy	-	-	-	57,941	14,284	72,225
WaRP Projects	956,125	279,628	1,235,753	671,554	216,573	888,127
WaRP Core	74,145	-	74,145	103,106	-	103,106
Sports and Social	3,773	-	3,773	1,055	-	1,055
DMH Carers Project	2,716	-	2,716	-	-	-
NHS Dorset ICB	111,522	30,704	142,226	243,130	76,455	319,585
Charity Development	8,000	-	8,000	-	-	-
Digital Development	6,000	-	6,000	-	-	-
Talbot Village Trust	-	-	-	19,387	5,996	25,383
Health Education England	-	-	-	551	-	551
Dorset Council	7,015	-	7,015	-	-	-
HIoW Healthcare	4,744	751	5,495	-	-	-
International Care Network	6,084	1,716	7,800	-	-	-
	1,180,124	312,799	1,492,923	1,096,724	313,308	1,410,032

5. Analysis of support costs

	Community Connection	WaRP Projects	HIoW Healthcare	NHS Dorset ICB	Total 2025
	£	£	£	£	£
Central Services					
HR	233	39,977	107	4,183	44,500
Finance	315	52,035	145	5,648	58,143
IT	312	51,455	139	5,583	57,489
CEO	312	51,501	139	5,593	57,545
Director of Operations	97	16,586	39	1,739	18,461
Premises & Office	57	9,677	23	1,013	10,770
Governance & Strategic Costs	184	23,318	75	3,274	26,851
PR & Marketing	72	12,179	24	1,274	13,549
Business Manager	134	22,900	60	2,397	25,491
	1,716	279,628	751	30,704	312,799

Support costs have been apportioned based on actual delivery hours.

6. Auditor's remuneration

	2025	2024
	£	£
Audit fee	7,554	7,194
Accountancy fees	5,712	5,010
Payroll services	3,227	5,233
Other services	-	202
	16,493	17,639

7. Trustees expenses and remuneration

No remuneration has been paid to or on behalf of the Trustees (2024: Nil).

No trustee (2024: One) had expenses reimbursed during the year of £Nil (2024: £148).

8. Employees and employment costs

	2025	2024
	£	£
Wages and salaries	1,064,123	1,013,609
Social security costs	73,575	68,584
Pension costs	40,411	36,225
	1,178,109	1,118,418

No employees were paid over £60,000 (2024: none).

The average monthly headcount (number of staff employed) during the year was:

	2025	2024
	People	People
Number of Staff	68	72

The full time equivalent number of staff employed on 31 March was:

	2025	2024
	People	People
Full time equivalent number of staff	34	35

The key management personnel of the Charity are considered to be the Chief Executive Officer, Director of Operations. The total employee benefits for key management personnel were £125,683 (2024: £122,641).

The Charity operates defined contribution pension schemes. The pension cost charged to the Statement of Financial Activities for the period represents contributions payable by the Charity to the schemes and amounted to £40,411 (2024: £36,225).

Volunteers contribute unpaid time to the services provided by the Charity. The estimated volunteer time for the period amounted to approximately 2,520 hours (2024: 3,520 hours), totalling an estimated £45,360 (2024: £63,360), which has not been reflected in the Statement of Financial Activities in accordance with the Charities SORP (FRS 102).

9. Tangible fixed assets

	Office Equipment & Furniture	Total
	£	£
Cost		
As at 01.04.24 and 31.03.25	6,032	6,032
Depreciation		
As at 01.04.24 and 31.03.25	6,032	6,032
Net book value		
As at 31.03.24 and 31.03.25	-	-

10. Debtors

	2025	2024
	£	£
Debtors	73,744	199,444
Prepayments	3,901	3,640
	77,645	203,084

11. Creditors: Amounts falling due within one year

	2025	2024
	£	£
Creditors	14,752	1,671
Accruals and deferred income	219,026	179,523
Other tax and social security	18,040	19,941
Other creditors	1,844	1,563
	253,662	202,698

12. Related party transactions

There were no related party transactions during the year. (2024: None).

Remuneration paid to key management personnel is disclosed in note 8.

13. Reconciliation of net (expenditure)/ income to net cashflow from operating activities

	2025	2024
	£	£
Net (expenditure) / income for the period as per the Statement of Financial Activities	(37,436)	79,299
Adjustments for:		
Depreciation charges	-	749
Decrease / (Increase) in debtors	125,439	(180,203)
Increase / (Decrease) in creditors	50,964	(174,005)
Interest from investments	(36,742)	(34,241)
Net cash generated by / (used in) from operating activities	102,225	(308,401)

14. Operating lease

Dorset Mental Health Forum is due to pay the following future minimum lease payments under non-cancellable operating leases for which it is the lessee, for each of the following periods:

	2025	2024
	£	£
Payments		
Within one year	1,181	1,181
Due in two to five years	295	1,475
	1,476	2,656

15. Statement of funds

	Balance 01.04.24	Income	Expenditure	Transfer	Balance 31.03.25
	£	£	£	£	£
Unrestricted funds					
General funds	335,362	162,818	(74,145)	(20,980)	403,055
Designated funds					
Charity development	25,000	-	(8,000)	13,000	30,000
Digital development	15,000	-	-	-	15,000
Evaluation activities	23,020	-	(6,000)	7,980	25,000
Total Unrestricted funds	398,382	162,818	(88,145)	-	473,055
Restricted funds					
Advocacy	29,028	-	-	-	29,028
Employment	39,775	-	-	-	39,775
Community Development	64,630	-	-	-	64,630
WaRP	639,210	1,206,689	(1,235,753)	-	610,146
DMH Carers Project	10,389	3,000	(2,716)	-	10,673
Sports and Social	6,266	7,685	(3,773)	-	10,178
HIoW Healthcare	-	49,253	(5,495)	-	43,758
NHS Dorset ICB	145,157	3,500	(142,226)	-	6,431
International Care Network	-	7,800	(7,800)	-	-
Dorset Council	-	14,742	(7,015)	-	7,727
Total Restricted funds	934,455	1,292,669	(1,404,778)	-	822,346
Total funds	1,332,837	1,455,487	(1,492,923)	-	1,295,401

15. Statement of funds (continued)

Restricted Funds

- Advocacy funds held to provide advocacy related activities for people and communities in Dorset.
- Employment funds held to provide employment related activities to individuals and local employers in Dorset.
- Community development funds (previously named Social Inclusion) held for projects to be started in the future.
- The Dorset Wellbeing and Recovery Partnership (WaRP) is a nationally recognised partnership between Dorset Mental Health Forum and Dorset HealthCare University NHS Foundation Trust which puts Lived Experience expertise at the heart of service design and delivery, to transform services and affect culture change. Funding supported around 25 different partnership projects and workstreams during the year. The Recovery Education Centre (REC), Dorset Work Matters, the Discovery Project and the Retreats were some of these projects.
- Funds received and administered for the independent Dorset Mental Health Carers Project, supported by the Dorset Mental Health Forum.
- Sports and Social funds included Active Dorset funding for gym membership for ex-offenders, Dorset Council funding for activities for asylum seekers and Sport England funding for Project Climbing group as part of the Forum's Sports and Social Programme.
- Hampshire & Isle of Wight NHS Foundation Trust (Hlo W NHS Trust) funds received for support and coaching around development of a Lived Experience Infrastructure.
- NHS Dorset ICB funds held for delivery of workstreams including mental health support in Primary Care, SMI Physical Health Checks, Neurodiversity and Dorset Open Door.
- International Care Network (ICN) funds received to develop capacity around wellbeing support and Recovery Education.
- Dorset Council funds received for coproduction of local delivery of Oliver McGowan training.

Designated Funds

- Designated Charity development funds held for the specific purpose of meeting expenditure directly related to the development of the Charity. Expenditure at the end of 2024/25 and into 2025/26 relates to costs for ongoing Trustee recruitment process.
- Designated Digital development funds held for the specific purpose of meeting expenditure directly related to digital transformation work within the Charity.
- Designated Evaluation activities funds held for the specific purpose of meeting expenditure directly related to evaluation activities within the Charity. Some Evaluation activities have taken place during 2024/25 and more are planned for 2025/26.

16. Analysis of net assets between funds

	Unrestricted Funds	Restricted Funds	Total Funds 2025	Unrestricted Funds	Restricted Funds	Total Funds 2024
	£	£	£	£	£	£
Tangible fixed assets	-	-	-	-	-	-
Current assets	520,508	1,028,555	1,549,063	434,576	1,100,959	1,535,535
Creditors due within one year	(47,453)	(206,209)	(253,662)	(36,194)	(166,504)	(202,698)
	473,055	822,346	1,295,401	398,382	934,455	1,332,837

17. Statement of funds for the year ended 31 March 2024

	01.04.23	Income	Expenditure	Transfer	31.03.24
	£	£	£	£	£
Unrestricted funds					
General funds	284,597	153,871	(103,106)	-	335,362
Designated funds					
Charity Development	25,000	-	-	-	25,000
Digital Development	15,000	-	-	-	15,000
Evaluation activities	23,020	-	-	-	23,020
Total unrestricted funds	347,617	153,871	(103,106)	-	398,382
Restricted funds					
Advocacy	72,244	29,010	(72,226)	-	29,028
Employment	39,775	-	-	-	39,775
Community Development	64,630	-	-	-	64,630
WaRP	660,127	822,455	(888,126)	44,754	639,210
Sports and Social	3,326	3,995	(1,055)	-	6,266
Talbot Village Trust	25,383	-	(25,383)	-	-
NHS Dorset ICB	33,047	431,695	(319,585)	-	145,157
DMH Carers Project	7,389	3,000	-	-	10,389
Health Education England	-	45,305	(551)	(44,754)	-
Total restricted funds	905,921	1,335,460	(1,306,926)	-	934,455
Total funds	1,253,538	1,489,331	(1,410,032)	-	1,332,837

Reference and Administrative Details

Trustees

Ann Abraham (retired Chair)
Alison Chorley
Sorrelle Ford
Tim Harry (new Chair)
Peter Lovibond
Arthur Merchant
Sarah Murray
Davide Rodrigues

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Becky Aldridge

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